

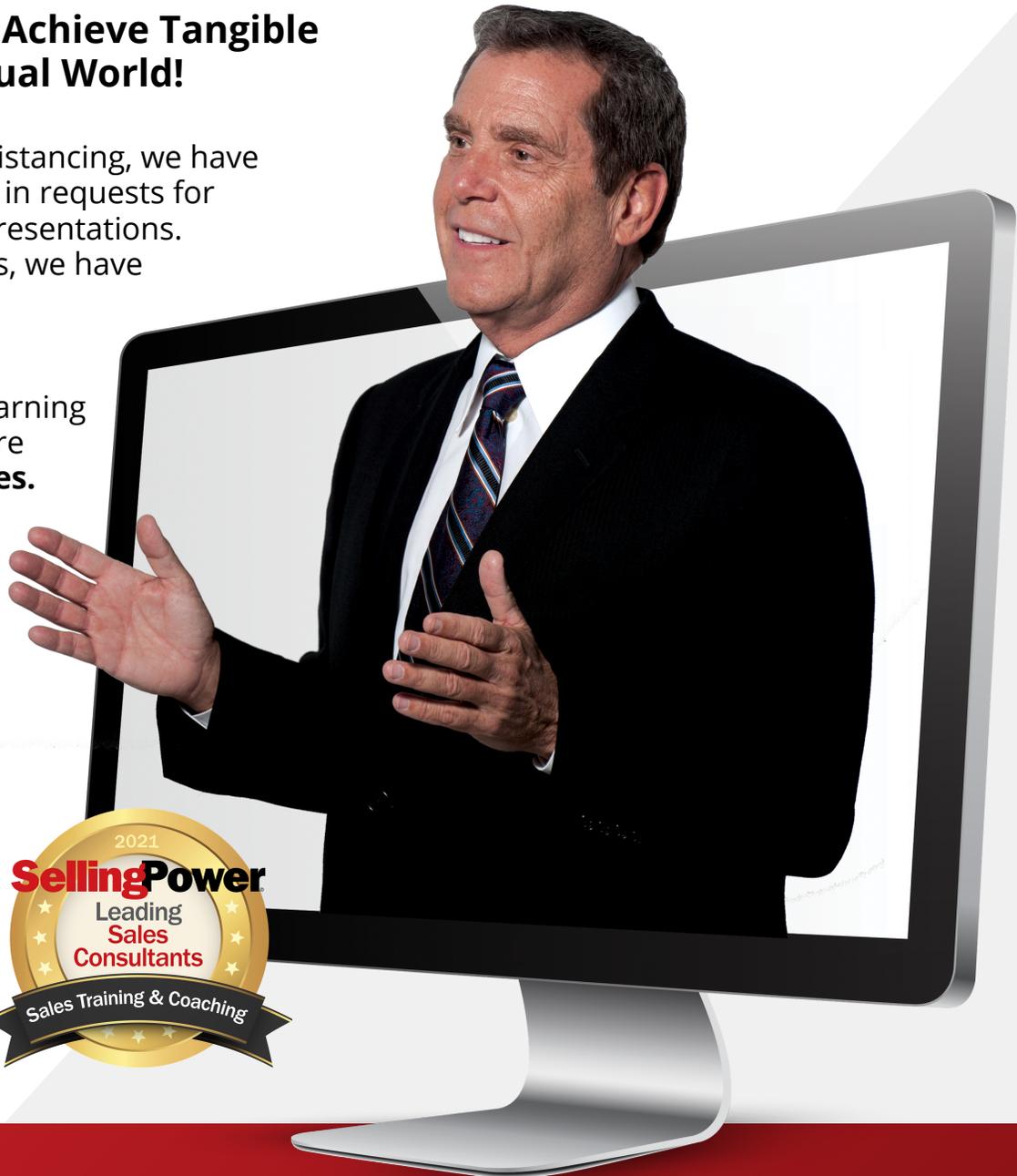
# Virtual Learning Sessions

with **Bill Cates**, CSP, CPAE

## Help Your Team Achieve Tangible Growth in a Virtual World!

As a result of social distancing, we have seen a huge increase in requests for virtual training and presentations. In the following pages, we have included some of our most popular topics.

Most of our virtual learning sessions run anywhere from **45 to 90 minutes**. The longer sessions allow for role play, demonstration, and breakouts.



## POPULAR SESSION TOPICS

Sessions will be tailored to the expected attendees.  
*See following pages for more details*

- 1. "Prospering In Your First Year - And Beyond" (New Agents/Advisors)**  
Get a Jumpstart on Client Acquisition through Referrals, Networking, and Communicating More Relevant & Compelling Value
- 2. "Multiply Your Best Clients in a Virtual World" (For All Levels)**  
Meeting More Ideal (Perfect Fit) Clients through Referrals and Personal Introductions
- 3. "Becoming Radically Relevant in Unpredictable Times" (For All Levels)**  
Communicate Your Relevant Value to Cut Through the Noise and Win More Ideal Clients
- 4. "Crafting Your Elevator Pitch" (For All Levels)**  
Communicating What You Do & What Makes You Different to Spark Interest
- 5. "Your Riches Are in Niches" (For All Levels)**  
Attract Ideal Clients in a Lucrative Target Market or Affinity Group

### More Client Acquisition Topic Ideas

Create a Customized Session That's Perfect for Your Group

- *Creating More Advocates for Your Business*
- *Creating Productive Referral Relationships with COIs Such as CPAs and Attorneys*
- *Building a Sales & Marketing Funnel that Keeps Feeding You Interested Prospects*
- *Maximizing Social Event Marketing to Meet High-Level Prospects*
- *Presentation Skills for Seminars and Other Marketing Events*

## PRICING & NEXT STEPS:

Contact Bill for single + multi-webinar pricing, as well as to discuss content and logistics.  
[BillCates@ReferralCoach.com](mailto:BillCates@ReferralCoach.com)



## **"Prospering In Your First Year - And Beyond"**

*Get a Jump Start on Client Acquisition through Referrals, Networking, and Communicating More Relevant & Compelling Value*

**A Coaching Webinar Session with Bill Cates, CSP, CPAE**

High-Content | Energetic | Impactful

Acquiring new clients is all about your confidence. Prospecting to acquire new clients takes confidence in the value you bring quickly to your prospects and clients, as well as the confidence to leverage your great work into referrals and introductions.

How do you build that confidence? It starts with learning a proven process to communicate your value, help your clients recognize that value, and then put yourself in position to receive unsolicited referrals and as for introductions without pushing or begging.

### **In this high-content session you will discover how to:**

- Develop a powerful mindset for growth.
- Become super referable in the eyes of your prospects, clients, and natural market.
- Promote referrals and introductions that can generate unsolicited referrals.
- Ask prospects, clients, and your natural market for introductions in an effective and appropriate manner.
- Secure a great introduction and position yourself to secure the appointment.
- Maximize your networking opportunities – both virtual and in person.
- Create productive relationships with Centers of Influence

*Don't just survive... THRIVE!*

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Bill Cates, CSP, CPAE, works with established financial advisors to speed up their growth without increasing their marketing budget. Advisors tap into Bill's proven process to multiply their best clients through introductions from advocates and Centers of Influence (such as CPAs and attorneys), communicate their value proposition more effectively, and create a reputation in a profitable target market. Bill helps advisors move from push prospecting to magnetic marketing – to attract more Right Fit Clients™.

Bill is the author of four best-selling books, *Get More Referrals Now*, *Don't Keep Me a Secret*, *Beyond Referrals*, and *Radical Relevance*. Bill is a highly sought-after international speaker and coach, as well as the founder of *The Cates Academy for Relationship Marketing™*.



## **"Multiply Your Best Clients in a Virtual World"**

*Meeting More Ideal Clients through Referrals and Personal Introductions*

**A Coaching Webinar Session with Bill Cates, CSP, CPAE**

High-Content | Energetic | Impactful

When someone is ready to take a fresh look at their financial future, they want to turn to someone they can trust.

This means, you want to start leveraging the *power of borrowed trust* that comes through introductions from clients and centers of influence.

**In this just-in-time web class, Bill Cates will show you:**

- Two powerful ways to suggest introductions that is totally sensitive to the current perfect storm with the virus, market, and overall economy.
- What other successful financial professionals are doing to grow their business during these trying times.
- How to enhance current client engagement to become super referable.
- 4 ways to promote and generate unsolicited introductions.
- A low-key way to ask for introductions without pushing, begging, or feeling inappropriate.
- 3 ways to create email introductions that connect you with the new prospect and spark their interest in hearing from you.

This web class will be a high-content, note-taking, ready-to-take-action program.

**Bring your questions and challenges to share with Bill for some real-time coaching.**

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## "Becoming Radically Relevant in Unpredictable Times"

*Sharpen Your Message to Cut Through the Noise and Win More Ideal Clients*

**A Coaching Webinar Session with Bill Cates, CSP, CPAE**

High-Content | Energetic | Impactful

Everyone's financial foundation has been shaken. They want to turn to someone they can trust.

This means, you want to start leveraging the *power of borrowed trust* that comes through introductions from clients and centers of influence.

**In this just-in-time web class, Bill Cates will show you:**

- Why communicating a more relevant and compelling message to your prospects, clients and centers of influence is more important now than ever before.
- What other successful financial professionals are doing to grow their business during these trying times.
- How to message your value proposition to attract just the right clients and repel the rest.
- How communicate what makes you different in a way that matters to your prospects.
- One huge mistake you might be making when you talk about your value.
- A process to find the bullseye (Right-Fit Clients™) for your business.
- How to establish a reputation in one or more target markets to move from push prospecting to magnetic marketing.

What you do (or don't do) to grow your business today will show up 3 to 6 months from now. If you put off working on client acquisition, you may be digging a deep hole in your business.

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## "Crafting Your Elevator Pitch"

*Communicating What You Do & What Makes You Different to Spark Interest*

**A Coaching Webinar Session with Bill Cates, CSP, CPAE**

High-Content | Energetic | Impactful

How you communicate your value to prospects, clients, and centers of influence is fundamental to your success. Do you have clear, concise, and confident answers to the key questions that every prospect wants to know?

**In this just-in-time web class, Bill Cates will show you:**

- the 7 components to generating your Value Positioning Statement.
- the power of choosing the right target market for you.
- how to drill down even further to the bullseye – your Right-Fit Client™.
- the 5 key elements of your Value Positioning Statement.
- how to identify and communicate what makes you different – in a way that attracts prospects to you and helps you win more clients.
- a comfortable way to talk about your value in social settings such as gatherings of friends and family.

This is NOT an old-style, overly cute, Elevator Pitch. This is an authentic, professional, and interesting way to discuss your value with others.

This web class will be a high-content, note-taking, ready-to-take-action program.

**Bring your questions and challenges to share with Bill for some real-time coaching.**

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## **"Your Riches are in Niches"**

*Attract Ideal Clients in a Lucrative Target Market*

**A Coaching Webinar Session with Bill Cates, CSP, CPAE**

High-Content | Energetic | Impactful

Are you tired of pursuing prospects? Would you rather have qualified prospects pursuing you?

The evidence is clear. Financial professionals who focus on a target market generally grow faster and farther than those who don't.

Are there exceptions? Of course. But in today's market – full of mind-numbing noise, conflicting perspectives, pressure on fees, etc. – becoming the go-to expert in a clearly defined niche will reduce the business-development friction.

### **Targeting a Niche Market or Affinity Group Will Help You:**

- Communicate a more relevant and compelling marketing message.
- Become super referable faster – to get referrals without asking.
- Build a reputation that attracts more Right-Fit Clients™ – profitable and a joy to serve.

### **In This High-Content Session You Will Discover How to:**

- Choose the right target market.
- Bust the 5 common misconceptions that keep you from getting rich in your niche.
- Identify the right prospects inside your market.
- Maximize the power of a well-defined market focus.
- Get more introductions to high-quality prospects.
- Expand the geographic reach of your business (if you wish).
- Create a reputation that draws prospects to contact you.

### **It's time for you to narrow your focus to expand your results.**

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**4-Session  
Package**

## VIRTUAL LEARNING SERIES "Creating Exponential Growth"

*A High-Content, **Comprehensive Virtual Training Program** Designed to Help You Acquire More Clients in a Virtual World and Beyond*

- Divided into **4 fast-paced and interactive sessions**.
- Filled with **real-life examples** from successful advisors financial professionals.
- **Demonstrations and role play** opportunities.
- **Coaching for managers** to reinforce the message and establish new behaviors.

### CONCEPTS & SKILLS COVERED:

#### 1. "Become Super Referable"

- Why client satisfaction isn't enough to get the flow of referrals going.
- The secret sauce that turns clients into advocates for your business.
- How to plant referral seeds that generate introductions without asking.
- How to ensure you only get introduced to Right-Fit Clients™.

#### 2. "Ask For Introductions Without Pushing or Begging"

- Ask for introductions using Bill's proven V.I.P.S. Formula™.
- Get "referred up" to higher-level prospects.
- Secure solid introductions that turn into appointments.
- Increase your confidence with the entire referral process

#### 3. "Craft Your Authentic Value Positioning Statement"

- The power of choosing the right target market for you.
- How to drill down even further to the bullseye – your Right-Fit Client™.
- The 5 key elements of your Value Positioning Statement.
- How to determine AND communicate what makes you unique to attract the best clients.

#### 4. "Reputation Marketing"

- The 4 key criteria for a good target market.
- The common misconceptions that keep you from getting rich in a niche.
- How to identify your ideal or Right-Fit Clients™ inside your market.
- Expand the geographic reach of your business (if you wish).
- Create a reputation that draws prospects to contact you.